

INVESTMENT FORUM AGENDA
WEDNESDAY, JANUARY 14, 2026
TALLWOOD TA-1, 10:30 AM and Zoom
Meeting ID: 8608 2658 362
Passcode: 286 680

The Zoom meeting link and ID will be in the Daily Schedule, forwarded by OLLI on Wednesday morning. Whether you registered for in-person or for Zoom, you are welcome to join us in-person at Tallwood in Room TA-1.

Forum Notes

Today is the Forum's last Club session before OLLI begins the Winter Term on Tuesday, January 20th due to the Federal Holiday (MLK Day) on Monday the 19th. Our next meeting, the first class of the Winter Term, will be on January 21st here in TA-1.

The Forum's class meetings begin at 11:50 AM and end at 1:15 PM; we will meet four (4) times as a class with the last class on February 11.

Markets

Results of the major indices and markets last trading week, January 5-9

Index/Market	Opening Value (Jan 5, 2026)	Closing Value (Jan 9, 2026)	12 month Change (as of Jan 9, 2026)
S&P 500	6892.19	6966.28	+17.71%
DJIA	48475.81	49504.07	+16.11%
NASDAQ	23449.67	23671.35	+21.52%
Russell 2000	2516.81	2624.22	+17.21%
Bitcoin (BTC)	93876.95	90386.65	-4.30%
Gold	4386.70	4500.90	+68.92%
10 Year Treasury Bond	4.183%	4.173	N/A

Source: Yahoo finance

This Week's Topics

The Week in Review

David Toms will recap some of the past week's economic, financial, and market news.

Buys, Sells, and Thinking Abouts

We will review the Buys, Sells, and Thinking Abouts submitted last week by Forum members.

Future Topics

My Investor Journey

While members of the Forum may have similar investing strategies, each of us has followed our own path to arrive at our current strategy. Please consider sharing how you have evolved as an investor, your current goals and investing style with the Forum. Please see Al Smuzynski or me for further information.

Other

Investment Forum Website

The Investment Forum website can be accessed at <https://olli.gmu.edu/>, then pressing the "Clubs & Activities" link in the center of the OLLI home page, followed by the "Inve\$tment Forum" link in the dropdown list. Please contact Jim Coile, the Webmaster with any presentation contributions, article suggestions, or improvements by email: ctj444@icloud.com. The website has current and past agenda, buy/sell lists and presentations.

Ray Willson

Investment Forum Associate Moderator

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Buy, Sell, & Thinking About for WE 01/09/2026	1/2	OLLI-GMU Investment Forum, 01/14/2026
Buy		Sell
PGIM AAA CLO ETF (PAAA) [N]		Janus Henderson AAA CLO ETF (JAAA) [-]
Sprott Junior Copper Miners ETF (COPJ) [N]		International Tower Hill Mines Ltd (THM) [C]
CVR Energy Inc (CVI) [+]		Evercore Inc Class A (EVR)[-]
Yelp (YELP) [+]		Rocket Companies Inc Ordinary Shares (RKT) [-]
Google (GOOGL)		Bristol Meyers Squib (BMY)
Vanguard S&P 500 (VOO) [+]		SPDR Gold Shares (GLD) [C]
Goldman Sachs Nasdaq-100 ETF (GPIQ) [++][2]		Alexandria Real Estate Equities (ARE) [C]
Invesco S&P 500® Momentum ETF (SPMO) [+]		
JP Morgan Income ETF (JPIE) [+]		
		Thinking About
		iShares Latin America 40 ETF (ILF)
		Vanguard Primecap (VPMCX)
Legend: [+] Add [-] Trim [C] Close [N] New [FA] Financial Advisor [#] number of members		

Buy, Sell, & Thinking About for WE 01/09/2026	2/2	OLLI-GMU Investment Forum, 01/14/2026
Buy		Sell
Vanguard International ETF (VXUS) [2] - [+] [N]		JPMorgan Nasdaq Equity Premium Income (JEPQ) [C]
Vanguard Industrials (VIS) [N]		Berkshire Hathaway Inc Class B (BRK.B) [-]
Chevron Corp (CVX) [N]		
Merck (MRK) [N]		
Procter & Gamble Co (PG) [N]		
Verizon (VZ) [N]		
NVIDIA (NVDA) [+]		
Amazon (AMZN) [+]		
Applied Materials, Inc. (AMAT) [+]		Everest Group LTD (EG)[-]
Caterpillar Inc (CAT) [+]		Swiss Re AG (SSREY) [C]
Synchrony Financial Bond, 19 Mar 2029 Maturity, 4.6124% YTM		
PG&E Corporation Bond, 15 Jan 2029 Maturity, 4.5765% YTM		
Crown Castle Inc. Bond, 15 Feb 2029 Maturity, 4.3841% YTM		
Western Midstream Partners LP Bond, 15 Jan 2029 Maturity, 4.5059% YTM		
		Thinking About
		Rockwell Automation Inc
Legend: [+] Add [-] Trim [C] Close [N] New [FA] Financial Advisor [#] number of members		